

Virtual Retrospectives Session

Convener – Ainsley

Scribe – III

Participants – Richard, Gerhard, Debra, Siegi, Oliver

Trends

- Teams in separate places/time zones
- Organizations decline to pay for travel
- Projects do multiple retrospectives
- Management restricts time available for retrospectives

Preference is to have everyone face-to-face for 1-3 days; reality is short retrospectives with remote participants

Retrospective frame for this session:

- Short time = 2 – 2.5 hours
- Remote participation
- May consist of a series of 2 hour sessions or a long 4 hour session with breaks
- Company context – there is no one in the organization whose job it is to facilitate retrospectives, facilitators volunteer as their schedules permit and/or on top of their workload.

Techniques

- Fairly fixed format
- Extensive pre-qualifying and planning
- Slide presentation for new consumers:
 - introduction rationale
 - guidelines
 - Prime Directive
- Must have commitment to change from Requestor (person who requests the retrospective – may be project lead, business sponsor, other management...) or will not agree to facilitate
- Once there is agreement to proceed, work with Requestor to create a short invitation (to be sent by Requestor) to participants, introducing the facilitator and letting them know what to expect.
- Pre-work questionnaire/survey about the project/iteration – may be word document or online, Requestor decision
- Start making contact with participants as early as possible; use every opportunity throughout the process to personalize
- Emphasize and publicize the Prime Directive
- Remember – every project is different, so although templates may be used, they must be customizable to allow for gathering project specific information that might otherwise be lost in a standard format.

✓ Session discussion – consensus - video never works

Survey – Sent by facilitator (email) to all retrospective participants identified by the Requestor. Survey is accompanied by an explanation of the retrospective process and discussion of anonymity.

- Facilitator may check back with respondents to edit/enhance replies while keeping them anonymous, when replies are so extreme as to not be conducive to learning (cannot do this if online survey is used).
- Current Requestor preference is for word doc survey.
- All participants receive a copy of the collated survey responses 1-2 days before the retrospective meeting to inspire the dialogue.

Section 1 – Structured questions about the project that can be answered on a scale (4 = strongly disagree, 3 = disagree, etc.). A subset of questions are standard for every retrospective and the rest are project specific, determined by the Requestor. For example:

- Communication between the project team and Sponsors was effective
- Project objectives were clearly understood
- The xxx process used to develop xxx was efficient.

Section 2 – Timeline; a rough timeline is created by the Requestor and survey respondents are asked to add to make additions/modifications (changes, vacations, highlights, lowlights, important stuff, signoffs, failures, demos, etc.) For example:

Time Period	Project/Iteration Activities	Key Events
Nov -Dec '03	Opportunity Definition Kick-off and Chartering Meeting Architecture Review	<ul style="list-style-type: none">• Team formed• Sponsor presentation• Charter approved• Holiday vacations
Jan – Mar '04	Investigation Design	<ul style="list-style-type: none">• Vendor presentations• Database expert joins team• Internal procurement fails to submit proposal to Company X on time
April '04	Design Development	<ul style="list-style-type: none">• Merger with Company Z• Sponsor leaves company
etc.		

The summary of survey responses portrays a timeline that reflects the team's view of the project.

Section 3 – Best Practices; ask for a description of the best practice AND the effect that it had on the project, provide a definition of a best practice.

Open the Section with: If you could do this project over again, what would you do exactly the same?

Section 4 – Recognition and Appreciations; ask for both team and individual, provide examples to help respondents.

Section 5 – Recommendations for Change; open the Section with: If you could do this project over again, what would you do differently next time?

Situation	Consequence	Recommendation for Change

Section 6 – Miscellaneous Comments; open format

Collating Survey Results/Create Survey Report

- Section 1 – compute averages for each question
- Timeline – highlight additions from surveys for easy identification
- Best Practices – group similar practices and label the theme
- Recognition & Appreciations – separate/document as Team and Individual
- Recommendations for Change - group similar issues and label the theme
- Miscellaneous Comments – move comments to other areas as appropriate; document moves in report
- Send the report 1-2 days before the meeting (this also serves as a meeting reminder!) ; ask participants to have a hard-copy of the report handy during the meeting.

The Meeting

- If possible, have a person other than the facilitator to scribe and/or toolsmith
- Start on time
- All participants should be in the same mode (sustain a single conversation)
- Make sure participants are familiar with whatever tool is being used (see tool list at end of notes); include instructions in earlier communication if needed.
- The tool should enable a high level of interaction, like:
 - Voting
 - Questions
 - Pictures (participants, presenters...)
 - Comments
- Review virtual meeting behavior reminders
- Review Prime Directive
- Basic process is to work through the collated survey responses report. In each section ask what is surprising, puzzling, etc. to start discussion.

- Timeline – ask for “ah-hahs” and any additions now that they have seen it
- Best Practices:
 - § Open with context reminder question - If you could do this project over again, what would you do exactly the same?
 - § Discussion may include creating one BP out of several similar entries
 - § have group vote for the Top 3 then take some time to reword so that other groups can understand as well
- Recognition & Appreciations – remind folks that this is good material for performance reviews, have group vote to select Team accomplishment they are the most proud of.
- Although there must be a set Agenda, the survey results feed a spontaneous agenda – have the group prioritize what areas are the most important to ensure that they get addressed in case the meeting runs out of time.
 - Recommendations for Change:
 - § open with context reminder question - If you could do this project over again, what would you do differently next time?
 - § have the group review the themes to ensure individual items are in the right groups and that the groups are named appropriately.
 - § have the group prioritize the themes.
 - § after some initial discussion, determine root causes
 - § sort Situations properly from Consequences
 - § reframe Situation/Consequence ideas to create an Issue Statement and make an appropriate recommendation for change.
- Acknowledge/address any parking lot items
- Create Action Plan
 - review Recommendations for Change for action items
 - ensure action items are doable
 - determine Who does What by When
 - include an action item for someone to share at least the top Best Practices

After the Meeting

Draft a meeting report and send to all participants for feedback. Incorporate feedback and send final report to participants and any others indicated by the Requestor.

✓ Session discussion –

- Other companies:
 - use online survey only
 - include Requestor/Sponsor in summarizing survey results
 - during the retrospective meeting, group all respondents in a location together and have a local facilitator; each location calls in to the virtual conference
- Ideas to keep participants involved:
 - ask for round-robin feedback on current topic
 - use frequent voting

- use open-ended questions
- virtual roll-call
- virtual happiness signal
- Online survey tool – Monkey
- Virtual Meeting tools:
 - NetMeeting
 - § microsoft
 - § free !
 - § share documents
 - § not good with more than 10-15 connections
 - WebX
 - § has voting
 - § expensive to purchase/rent
 - Raindance
 - § voting/polling
 - § seating chart
 - § share control
 - Easy WinWin – see Gerhard
 - § distributed decision-making tool
 - § good statistical capability
 - ReadyTalk
 - § www.readytalk.com
 - § recording
 - § CHEAP
 - Skype
 - § www.skype.com
 - § voice over IP
 - § high quality
 - § FREE
 - Oracle Web Conferencing
 - HP Virtual Classroom
 - § voting
 - § hands up/down
 - § screen sections for multiple displays
 - § voice over IP
 - § recording
 - § <http://education.hp.com/hpvc/features.htm>